UBI SYSTEM MENU

Rev: Sept 2001   Section: **1700**

State of Washington
Unified Business Identifier (UBI)
System Menu

Today is 09/12/2001

          -= INQUIRY =-   **-= UPDATE =-**

1 UBI Name/Address   **A UBI New Account Add**
2 Agency Number Cross-reference   **(password required)**
3 UBI News   **B UBI Unverified Account**
4 Alpha Cross-reference
5 Availability Schedule   **C UBI News Add/Delete**

              Enter Selection: __ (1-5 or A-C)
Year 2000 Readiness Disclosure - This System is Year 2000 compliant

= < 1700 > = = < BI > = = = = = = = < Unified Business Identifier > = = = = = = = = = = < P >== < R100 >
  F1-Enter   **F10-Help**   **F12-Menu/GoTo**

UNIFIED BUSINESS IDENTIFIER (UBI) MENU SCREEN 1700

The Unified Business Identifier Menu Screen is used by the Departments of Licensing (DOL), Labor & Industries (L&I), Revenue (DOR), Employment Security (ES), and the Office of the Secretary of State (SOS) to view:

- UBI Account Name and Address
- Agency Name Cross-References
- Alpha Cross-Reference
- UBI News
- UBI New Account Add
- UBI Unverified Account Update

NOTE: SF means: hold down the shift key and the function key at the same time. (Example Shift + F3 would be written SF3.)

1.   To select an "**INQUIRY**" from the UBI Menu:

- Enter the "Selection" number then press function key F1 to inquire.

- DOR staff can use the "Command Line" (the updateable line at the bottom of the screen) to move to a specific screen. Input screen number on line, then press function key F12-Menu/GoTo.

2.   To select an "**UPDATE**" from the UBI Menu:

- Enter the "Selection" alpha character then press function key F1 to move to selected update screen.

- DOR staff can use the "Command Line" (the updateable line at the bottom of the screen) to move to a specific screen. Input screen number on line; press function key F12-Menu/GoTo.

NOTE: Inquiry Selection number 5 "Availability Schedule" has limited access for DOR staff.

UBI NAME ADDRESS INQUIRY

UBI NAME ADDRESS INQUIRY SCREEN 1701

The UBI Name Address Inquiry Screen provides information on a UBI account number or Name. The account's address, phone number, open / close dates, owner account type, SS#, FEIN, agencies affected, cross-references and date UBI # initiated are displayed.

1.   Key in UBI# or Name on Input Line on top of screen.

- Press Function Key F1 if inquiring by name.

- Press Function Key F2 to inquiring by UBI#.

```
Enter UBI # or NAME : _____
                       000 000 000                        OPEN       CLOSED
NAME /DBA / ADDRESS /PHONE #                   UBI
                                               LAST ACT:
                                               TYPE OWNER
                                 AGENCIES AFFECTED:  DOR REVOKED ACCT:
                                               DOR
                                               DOL
                                               ES
SSN                                            L&I
FEIN                                           SOS

 CROSS REFERENCES
                                      INITIATED DATE:
                                      DOR RECEIVED DATE:
                                      DOR VERIFIED DATE:
                                      DOR REVOKED DATE:




= < 1701 > = = < BI > = ====== = < UBI  Name Address Inquiry > = ========== < P > == < R101 > =
  F1-Alpha Xref      F2-UBI Inq      F3-Agency Xref     F4-Cross Refs      F5-Issue UBI
  F7-DOR Inq      F8-Print Scrn                    F10-Help          F12-Menu/GoTo
```

2.   When account information is displayed, use shortcut function keys to view additional information for that UBI.

- F3 will take you to the "UBI Agency Acct Number Xref" screen. (See page 9-6.)

- F4 will let you see if the UBI account lists additional cross-references, if available.

- F5 will take you to the "UBI New Account Add" screen. (See page 1-5.)

- The screen will indicate if the account has "General Information". In the lower left of the screen an indicator will be present: "For General Info—Press F6".   Press function key F6 to review information. (See page 9-5.)

- F7 will take you to the "UBI -- DOR Name/Address Inq" screen. (See page 9-10.)

- F8 will print the current screen. (May not be functional for all agencies.)

- F9 if available, has limited access.

- F12 will take you back to the "Unified Business Identifier Menu" screen. (See page 9-1.)

UBI NAME ADDRESS INQUIRY – GENERAL INFORMATION

```
 Enter UBI # or NAME : _____        601 000
000
 Date (optional): _____       00 / 00 / 0000
 A B C CORPORATION

  Date   USER#  UBI General Info
 10/00/2000  1169 CORP OFF: SMITH BRUCE E




 = < 1701 > == < BI > ======== < UBI  Name  Address  Inquiry > ======== < P >== < R101 > =
  F1-Enter       F6-Page Forward            SF6-Page Backward          F12-Go to/Menu
                 F2-UBI Inq                 F8-Print Screen            F10-Help
```

UBI NAME ADDRESS INQUIRY – GENERAL INFORMATION SCREEN 1701

1. UBI Name Address Inquiry screen displays shortcut function keys to other screens.

- F1 will take you to an inquiry of a different UBI number or name additional information.

- F2 will take you back to the "UBI Name Address Inquiry" screen.

- F6 will page forward for more information on the selected account.

- SF6 will page backward to previous information.

- F8 will print screen.

- F10 is Help for current screen.

- F12 will Return to Menu /or Go To key.

UBI AGENCY ACCT NUMBER XREF

```
Enter  Agency# & Code  or  UBI#  or  Name:
_____
 (Use a ; to separate agency# & code)          601000000

 A B C CORPORATION


 1234 S ANY ST # H
 SEATTLE                    WA  98108-5112

All agency numbers associated with UBI number:  601 000 000
    00300001        L&I
    0010001         DOL
    15509900        ES
    601000000       DOR




= < 1702 > = = < BI > ======= < UBI Agency Acct Number Xref  > ========= <  P  > == < R103 >
 F1-Alpha Xref          F2-UBI Inq          F3-Agency Xref       F5-Page Fwd        F10-Help
                                                                  F6-Page Bwd        F12-Menu/GoTo
```

UBI AGENCY ACCT NUMBER SCREEN 1702

The UBI Agency Acct Number Screen provides information on all agency numbers associated with UBI number that is displayed.

1. Key in UBI# on Input Line on top of screen.

- Press Function Key "F3" to inquire about other agencies' numbers.

2. You have the ability to select an account by an "Agency Number" & code:

- Key in the Agency number, a "semi colon", no spaces, then the agency code on Input Line. Example: 64300240;ES. Press F3.

  NOTE: DOL accounts can only be accessed by UBI#. Press F3.

3. UBI Name Address Inquiry screen displays shortcut function keys to other screens.

- F1 will take you to the "UBI Alpha Xref Inquiry" screen.

- F2 will take you to the "UBI Name Address Inquiry" screen.

- F3 will be used to select another Xref on the "UBI Agency Acct Number Xref" screen.

- F5 will page forward for more information on the selected account.

- F6 will page backward to previous information.

- F8 will print the current screen (hidden function).

- F9 if available, has limited access.

- F12 will Return to Menu /or Go To key.

UBI ALPHA XREF INQUIRY

```
ENTER NAME, UBI, OR SEQ.#: _____
                              A & M
 SEQ    UBI#        Entity/DBA/Spouse/Partner      DOR Status     City
        State
 1    601662759   A & H ENTERPRISES L L C                         TWISP         WA
                                   LLC        Active
 2    601546043   A & M WAREHOUSES INC                            AUBURN        WA
                                   CORP       Active
 3    601604840   A & R CABLE THINNING INC                        NOOKSACK      WA
                                   CORP       Active
 4    600064694   A & R CONSTRUCTION INC                          LEWISTON      ID
                                   CORP       Active
 5    601886859   A & V ACQUISITIONS INC                          STRONGSVILL   OH
                                   CORP       Active
 6    578030495   A 1 AUTO WRECKING                               WOODINVILLE   WA
                                   CORP       Active
 7    600465142   A 1 QUALITY PAINTING                            BENTON CITY   WA
                                   SOLE       Active
 8    600027328   A A A BUILDING MAINTENANCE INC                  SEATTLE       WA
                                   CORP       Closed

= < 1703 > ==< BI > ========= < UBI Alpha Xref Inquiry > ============ < D > == < R102> ===
F1-Xref        F2-UBI Inq        F3-Agency Xref   F5-Page Fwd       F6-Page Back
F7-DOR Inq     F8- Issue UBI                      F10-Help          F12-Menu/GoTo
```

UBI ALPHA CROSS REFERENCE SCREEN 1703

The UBI Alpha Cross Reference (Xref) Screen provides the ability to search for a UBI account by Sequence Line number, UBI number or UBI Name.

- Seq is the number associated with the line of information. There are eight (8) sequence lines on each UBI Alpha Cross Reference (Xref) Inquiry screen.

- Search can be by Entity Name, DBA Name, Spouse or Partner name.

- DOR Status indicates if the account is Active (open) or Closed.

1. Key in Seq number, UBI# or Name on Input Line on top of screen.

2.   UBI Alpha Xref Inquiry screen displays shortcut function keys to other
            screens.

- F1 will take you to the "UBI Alpha Xref Inquiry" screen.

    ENTER NAME; press F1.

- F2 will take you to the "UBI Name Address" screen.

    ENTER UBI# or SEQUENCE NBR; press F2.

- F3 will allow you to inquire on another acct on the "UBI Agency
  Acct Number Xref" screen.

    ENTER UBI# or SEQUENCE NBR; press F3.

- F5 will page forward through the Alpha listing.

- F6 will page backward for previous Alpha information.

- F7 will take you to UBI -- DOR Name/Address Inq screen.

    ENTER UBI# or SEQUENCE NBR; press F7.

- F8 will take you to the UBI New Account Add screen.

- F9, if available, has limited access.

- F10 is the Help Screen.

- F12 will Return to Menu /or Go To key.

UBI -- DOR NAME/ADDRESS INQ

```
Enter Reg # or Seq #: _____      602 146 633          Open:   09/01/2001
                                                          Closed:  00/00/0000

A B C CORPORATION
                                                          CORPORATION
                                                          EXCISE TAX
1234 S ANY ST #H
SEATTLE                      WA  98108-5112
(206) 555 - 5555     FAX: (000) 000-0000
UBI: 601 000 000           Frequency: QUARTERLY
NAICS: 444120              Effective: 00/00/0000
SIC: 5231                  Previous:
LSU: 1901                  Email:
Loc: 191


 - Acct Info -              - Acct Status -            Last Change: 09/07/2001
DED DETAIL                                             NEW




=< 1704 >==< BI >=======< UBI -- DOR Name/Address Inq >==========< P >===< R330 >=
F1-Enter    F3-Screen 2    F5-EFT       F10-Help     F11-Return      F12-Menu/GoTo
```

UBI – DOR NAME/ ADDRESS INQ SCREEN 1

The UBI – DOR Name Address Inquiry Screen provides information on an account number in Department of Revenue Tax Reporting screen. The account's address, phone number, open / close dates, owner account type, phone number, reporting frequency, effective date of frequency, previous reporting frequency, Standard Industrial Classification Code (SIC), North American Industry Classification System Code (NAICS), Local Sales/Use Tax Code (LSU), Locator Code (Loc), Email address, Acct Information, Acct Status, Last Change action and Last Change date are displayed.

1.   Key in UBI# on Input Line on top of screen.

   •   Press Function Key "F1" to inquire for DOR Name/Address.

2.   UBI – DOR Name/Address Inquiry screen lists shortcut function keys to other screens.

   •   F3 will take you to the "UBI—DOR Name/Address Inq Screen 2.

   •   F5, if available, has limited access.

```
┌─────────────────────────────────────────────────────────────────────┐
│  Enter Reg # or Seq #: _____        602 146 633                   │
│                                                                       │
│   A B C CORPORATION                                                    │
│                                                                       │
│                                                                       │
│  Excise Forms Date: Q3/01              Retail Cig License Exp:   00/0000 │
│                                        Whsle Cig License Exp:  00/0000 │
│                                        Fish License Mo/Yr:      00/0000 │
│                                        Fish Dealer #:        000000    │
│                                                                       │
│    - Audit Assignment -                                               │
│   Date Assigned:              Audit Period: 00 0000 to 00 0000        │
│   Audit Number:  0000000          Supervisor:                        │
│   Section/Div:                Auditor:                                │
│                                                                       │
│   - More Acct Info -     - More Acct Status -                         │
│                                                                       │
│                                                                       │
│                                                                       │
│  =< 1704 >==< BI >=======< UBI -- DOR Name/Address Inq >=======< P >==< R330 >= │
│   F1-Enter    F2-Screen 1    F5-EFT      F10-Help     F11-Return    F12-Menu/GoTo │
└─────────────────────────────────────────────────────────────────────┘
```

UBI – DOR NAME/ ADDRESS INQ SCREEN 2

The UBI – DOR Name Address Inquiry Screen provides information on an account number in Department of Revenue Tax Reporting system. The account's Excise Tax forms date, Retail Cigarette License Expiration date, Wholesale Cigarette License Expiration date, Fish License year, Fish Dealer number, Audit Information, more Acct Info and more Acct Status are displayed.

3.   Key in UBI# on Input Line on top of screen.

•   Press Function Key "F1" to inquire for DOR Name/Address.

4.   UBI – DOR Name/Address Inquiry screen lists shortcut function keys to other screens.

•   F2 will take you to the "UBI—DOR Name/Address Inq Screen 1.

•   F5, if available, has limited access.

UBI NEWS INQUIRY MAIN MENU

```
                    UBI News Inquiry Main Menu          PAGE  1

   Name                                  News Date   Agency     Subject


__SMITH,  DENISE                         08/18/2001    DOR       FEIN










 You are at the end of the news

= <  1705  >== <  BI  > ======= <  UBI News Inquiry Main Menu  > ========== < P >==< R104 > =
   F1-News Detail          F6-Pg Fwd         SF6-Pg Bwd        SF10-Help          F12-Menu/Go to
```

UBI NEWS INQUIRY MAIN MENU SCREEN 1705

The UBI News Inquiry Main Menu Screen provides UBI news that may be critical to all agencies. This screen has limited update access.

1. Press Function Key F1 to inquire for News Detail.

- If there are multiple news items, place the cursor to the left of the item to be viewed, then press F1.

- If there are additional News Details on multiple pages, the screen will prompt the user to "Press F6 for additional News Items".

Function Keys

- F6 will page forward for more information.

- SF6 will page backward to previous information.

- SF10 is Help for current screen.

- F12 will Return to Menu /or Go To key.

```
                        UBI News Detail                        PAGE  1

   Name:       SMITH,  DENISE
 News Date:    08/18/2001                     Expired Date: 12/31/2000
  Agency:      DOR                                         Subject  FEIN

 Please review the memorandum of Understanding with the IRS, effective October
 1, 1996.

 USE ONLY BLUE OR BLACK INK WHEN WRITING THE FEIN ON THE SS-4 FORM.  ONLY ISSUE
 FOR COUNTER CUSTOMERS WITH MASTER APPLICATION

 DO NOT ACCEPT INCOMPLETE FORMS.   IRS CONFIRMATION ON THE CONDITIONAL FEIN
 WILL TAKE UP TO TWO (2) WEEKS AFTER RECEIVEING THE SS-4 FROM DOL. (PROVIDING
 THERE IS NO PROBLEM WITH THE SS-4 FROM)

 STATE OF WASHINGTON IS ONLY AUTHORIZED TO ISSUE FEIN FOR:

 More news text at the next page


=== < 1705 > == < BI > ======== <  UBI News Inquiry Detail  > =============== < R104BI 2> =
  F1-News List              F6-Pg Fwd        SF6-Pg Bwd       SF10-Help       F12-Menu/Go to
```

2.   UBI News Inquiry Detail screen displays shortcut function keys to other
       screens.

- F1 returns to News List.

- F6, if needed, is used to page forward for more information.

- SF6, if needed, is used to page backward for previous information.

- SF10, Help for UBI News Inquiry Main Menu screen.

- F12, Menu or Go To.

UNVERIFIED ACCOUNT UPDATE

```
 Enter UBI number to Change _____
                                                         OPEN    CLOSED
 UBI #:   602 000 000                       UBI 01 01 2001  00 00 0000
 NAME:   SMITH INC_____
 DBA:     SMITHYS_____
 ADDR1:   _____
 ADDR2:   12345 ANY ST_____
 CITY/ZIP: ANY TOWN_____   WA   98504 1234
 PHONE:  ( 360 ) 555 555
                                          TYPE OWNER:  C
 FEIN:    91 - 2222222                     AGENCIES AFFECTED:
                                             DOR   A
                                             DOL   *
                                             ES    *
                                             L&I   *
                                             SOS   *



 Enter UBI account number and press F1
 =< 1755 >===< BI >========< Unverified Account Update >===========< P >==< R111 >
  F1-Display Account  F2-Next Screen  SF5-UBI Menu  SF10-Help  F12 Menu/GoTo
```

UNVERIFIED ACCOUNT UPDATE SCREEN 1755

Unverified Account Update Screen is used to change the account information for UBI numbers that have not been verified. "Unverified" means that the account information has not been processed by DOR through Agency Required Document (ARD) or that the DOR Verified Date on the UBI Name/ Address screen 1701 has not been manually updated.   If the account has been "Verified", you will receive the message: "You may not change this account." Send a UBI Change Form to the Department of Licensing for any changes to the UBI.

1.   To change the account information, enter UBI number on Input Line on top of screen and press F1 function key to inquire.

- You may change the following information on screen one:

Name	Open date	Close date	DBA
Addr1	Addr2	City/Zip line	Phone number
FEIN	Type of Owner	Agencies Affected	

- Press F2 for the next screen:

```
ENTER PARTNER NAME(S)

 1.  SMITHYS INC _____   ** OWNER'S NAME
   SSN:  000 00 0000
 2.  _____   ** DOING BUSINESS AS

 3.  _____
   SSN:  000 00 0000
 4.  _____
   SSN:  000 00 0000
 5.  _____
   SSN:  000 00 0000
 6.  _____
   SSN:  000 00 0000
 7.  _____
   SSN:  000 00 0000

GENERAL INFORMATION
 _____
 _____

NO CHANGES TO THE FIRST NAME AND ADDRESS SCREEN          GA40402
=< 1755 >==< BI >========< Unverified Account Update >===========< P >==< R111 >
F2-Change                 F3-Cancel                 SF10-Help
```

- You may change the following information on screen two:

  SSN of owner

  Names and SSN of all cross-references

  General Information notes

- Press F2 key to change data or F3 to cancel Update.

2. Unverified Account Update screen displays shortcut function keys to other screens

- SF5 will take you to the "Unified Business Identifier Menu" screen